

# How to Help Leaders Succeed: A Guide to Successful Executive Career Transitions



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## Introduction

Landing a new executive job can be tough. Succeeding in that new job may be even tougher. According to Bradt, Check & Pedraza (2009), less than 36 percent of executives hired from outside an organization will succeed and perform well in their new jobs. A Harvard Business School report estimated a failure rate between 40 and 60 percent for all U.S. executives in 2003. A 2005 Right Management report found that approximately 30 percent of new managers and executives fail at their new jobs and leave within 18 months (Williams, 2010).

The ramifications are significant. Losing an employee can cost as much as three times the person's salary, according to estimates from the HR consulting firm The Wynhurst Group. The cost of losing an executive goes well beyond financial, however, and these costs may be more difficult to overcome. Employees can lose trust and confidence in their leadership teams which can affect morale, turnover, service, quality, processes and much more.

### Our Promise

This white paper provides HR and talent management professionals six simple steps they can take with newly hired executives to ensure successful transitions into their roles and organizational cultures. These steps are cost affordable and can be scaled to any size organization. With today's leaner organizations, it is more important than ever to reduce the break-even point—the point at which new leaders have contributed as much value to their organizations as they have consumed from it—from six to three months (Watkins, 2003). Throughout this white paper are examples of organizations that have recognized this need and have developed programs that provide guidance to their executives to ensure successful career transitions.

### The 6 Derailers for New Executives

According to the Corporate Leadership Council, there are six derailers for new executives:

1. Failure to establish key connections and partnerships.
2. Lack of political savvy or support to effectively navigate through the organization.
3. Failure to establish cultural fit.
4. Confusion about role expectations.
5. Lack of feedback and coaching.
6. Ineffective people management/team building skills

(Source: Moore,

## The Basics of Onboarding

The term “onboarding” is frequently used to describe the process used to acclimate new executives to organizations. According to George Bradt, co-author of *Onboarding: How to Get Your New Employees Up to Speed in Half the Time*, onboarding is “the process of acquiring, accommodating, assimilating and accelerating new team members, whether they come from inside or outside the organization.”

Too often, a newly hired executive’s assimilation to an organization’s practices, policies and culture are left to chance and personal initiative. And while U.S. culture values a “bootstraps” mentality, leaving new executives to their own devices and expecting them to learn about the organization on their own can lead to errors in judgment, poor decision making, and misinterpretation of the organization’s culture. In short, many new executives end up “shooting themselves in the foot,” alienating superiors and co-workers and polarizing the workplace.

HR and talent management professionals can help new executives acclimate to their new roles and/or organizations by ensuring they have the knowledge and tools needed to succeed. This responsibility is not a one-time action; it is an ongoing process that starts before they are hired and continues throughout their careers.

There probably are a thousand different ways talent management and HR professionals can help

### Johnson & Johnson: A Formal Approach to Onboarding



The Brunswick, New Jersey-based pharmaceutical giant Johnson & Johnson takes a more formal approach to executive onboarding. After assessing new executive success rates, the company established three different programs for new leaders coming into the company and for those being promoted from within the organization.

Their *New Business Leader* program targets senior executives moving from a functional responsibility to a more complete job. The *Transitions Leadership Forum* is for vice presidents and executive vice presidents taking on new functional roles, and the *Transitions Coaching Program* helps senior leaders continue their transitions through a formal coaching program.

career transitions, but focusing on these six simple steps consistently will help standardize and accelerate successful career transitions.

### **Johnson & Johnson (...continued)**

As a result of these programs, Johnson & Johnson reports that 95 percent of new leaders feel they are better able to focus on appropriate priorities, 83 percent of new leaders say they developed new partnerships and 82 percent said they had clarified expectations with their new boss.

## **Step 1: Encourage Candidates to Do Their Homework Before the Interview**

A wise person once said, “Some people dream of success...while others wake up and work hard at it.” Unfortunately, for many HR professionals, it seems that people increasingly expect HR to lead them to career success. It is important to let candidates know from the outset that they are in charge of their career paths. They must develop the path, research and achieve the skills needed to move along that path, and identify the coaches and/or mentors to help them get there.

That is not to say that HR cannot facilitate the process. HR can prepare outside candidates during the screening process by asking about their career goals and how they think the position will help them get closer to achieving those goals; suggesting they research the organization; and offering ideas as to where they can obtain more information (usually through the organization’s website and news media).

These simple suggestions let candidates know that a) they are expected to have some basic understanding of the job and the organization at the time of the interview, and b) the organization is interested in their employees’ career development and the “fit” of an employee to the position in particular and the organization as a whole.

## Step 2: Give New Executives as Much Information as Possible About the Organization

New hires are often so busy wrapping things up in their previous positions that they let important steps to orient themselves to their new jobs lag—steps like learning more about their new position and organization. Let new hires know that homework doesn't end at the pre-interview stage. Encourage them to map out a plan for the transition and to be sure to include time to learn about the new job and/or organization.

New executives should assess the organization and determine where it stands in its lifecycle. Is the organization expanding? Is it a new start-up or a more established organization focused on sustaining success? Is the organization going through a rough patch, and have you been hired to clean it up? Is it ripe for a takeover? Is it a newly merged organization? Each phase offers different opportunities and calls for different leadership approaches.

Before their first day, HR should provide new executives with information about the organization so they can learn the technical, political (key sources of influence and coalitions) and cultural (the norms, habits and customs that shape the organization) aspects of the organization – knowledge they will need to succeed.

### Encourage new leaders to obtain as much publicly available information about the organization as possible

Encourage new leaders to conduct an external scan of the organization to assess how the organization is perceived from the outside in. Encourage them to review any and all public documents available (such as annual reports if applicable). An Internet search should provide plenty of quantitative and qualitative information and give new leaders a sense of the issues surrounding the organization.

## Provide organizational performance data

Now that you have encouraged new leaders to do their homework by gathering available data, it is time to provide them with important organizational data such as:

- Financial reports
- Strategic plans
- Employee performance reviews of direct reports (personally identifying information removed if the reviews are provided before assuming the position)
- Results of employee satisfaction and loyalty surveys from within the group and among your customers
- Internal performance targets and metrics
- Exit interview summaries
- Individual development plans for everyone in the organization (personally identifying information removed if the information is provided before assuming the position)
- Analyst reports
- Goals and objectives of the predecessor
- Internal/external customer goals and objectives

They need to know the good, the bad and the not-so-pretty aspects of the organization before they start the job, and this information will give them insight into organizational strategies, goals and culture.

## Step 3: Provide Opportunities to Meet with Key Stakeholders

Effective orientation must consider how new leaders can avoid the missteps often caused by a lack of understanding of an organization's technical, political and cultural landscape. Although providing internal documentation can shed some light, HR and talent management professionals can help new leaders gain valuable knowledge about the organization's internal operations by ensuring that new leaders meet with key stakeholders. Key stakeholders include the job incumbent (if possible), the new leader's direct reports, the boss two levels up (the boss' boss), peers, staff members and key external clients. If possible, have newly hired executives meet with someone from the internal communications department to gain insight on how to effectively "frame the message" they want to leave with these stakeholders in a way that aligns with organizational communication approaches and practices. These meetings should be scheduled during the new leader's first few days on the new job.

### Meeting the Job Incumbent

This meeting will help new leaders get a better understanding of the incumbent's perspective on the organizational strategy, priorities, performance objectives and any measures for those objectives. The goal is for incoming leaders to get the incumbent's ideas on the key challenges facing the organization in the next 12, 24 and 36 months—the near future.

HR executives can coach new leaders for this interview by suggesting the following questions:

- What is the guidance from your boss (your boss' boss)?
- What are the informal keys to success here?
- Where is the strategy working well and where can it be improved?
- What are the organization's strengths and challenges?
- What metrics does the organization use to track progress?

While it is important that new executives come to the job with an open mind and form their own opinions about people and the environment, this might be a good time for them to get their predecessor's opinion on:

- Primary customers' and the boss' likes, dislikes and "hot buttons" issues.

- Information about staff, such as informal leaders, the likes and dislikes of each, who can be counted on for what, special skill sets, etc.

## Meeting the Boss

This meeting should focus on getting a sense of the boss' priorities. New leaders should ask similar questions to those posed to the incumbent, but the following questions could also be revealing:

- What are the organization's top three to five priorities?
- How do we plan to achieve those priorities?
- What are your top three priorities? (This question will allow new leaders to see how well that person's individual priorities match with the organization's priorities.)
- What are the three to five things we should preserve and maintain? Why?
- What are the top three things that need to be changed? Why?
- What goals do you hope I achieve? What do you envision is the timeframe for accomplishing these goals?
- What are you most concerned that I do?
- If you were in my shoes, what would you do first?
- What does "success" look like for you in your job?
- What would "success" look like for me in my job?

## Meeting with Other Stakeholders

New leaders should also be given a chance to meet with his/her boss' boss, peers, direct reports and clients. Similar questions to the ones listed above should be asked and answers should be noted. Asking similar if not identical questions allow new leaders to assess how consistent organizational goals, objectives and priorities are among all leadership levels and to identify hidden agenda items that may affect their decision making.

At the end of these meetings, HR should suggest that it may be appropriate for the new leader to establish or begin to establish customer/supplier agreements that will be a "contract" for what, when and how each stakeholder will support each other. This "contract" should identify deliverables, articulate timing, processes and accountability, and any other details important to any of the involved parties.



## Bristol-Myers Squibb: “Survivor Analysis”



A “survivor analysis” at global biopharmaceutical company Bristol-Myers Squibb found that they were losing new executives because the organization was not taking steps to ensure their success.

They developed an executive onboarding program that started during the selection process. All candidates for positions of vice president or above are subjected to a three-hour interview intended to gauge their leadership abilities and organizational fit.

Newly hired executives are under intensive scrutiny during their first 30-60 days. During that time, they are provided organizational guidelines, given opportunities to clarify their roles, having meetings arranged with influential colleagues and informed of the organization’s cultural norms.

Follow-up meetings are scheduled during the new executives first year to check on their progress. Bristol-Myers Squibb reports a substantial improvement in their executive retention rates (Wells, 2005).

## Step 4: Help New Leaders Establish a Clear Break Point

New leaders—whether they are moving into a new position from within the organization or from outside the organization—generally have 30 to 60 days to make the transition. If new leaders are moving into a new position from within the organization, HR can assist the transition by ensuring there is enough time for them to wrap-up and delegate work from the previous position. Let new leaders know they should determine what tasks and projects they will complete for their current job and which tasks and projects will be left undone but sufficiently documented to allow a successor to efficiently and quickly take over.

As new leaders scramble to wrap-up their current roles and prepare for their new ones, encourage them to think through the differences in the old and new jobs. Leadership is situational, and by virtue of moving to a new position, they are, in fact, in a new “situation.” Consequently, they may need to change their behaviors. The chart on the following page may help crystallize their thinking in this regard by identifying the behavior and offering ideas as to what specifically those changes should be.

## Step 5: Assign a Coach and Follow-up on Progress

Laying the framework for new leaders to succeed shouldn't stop after the first 60 days. Ask anyone who has moved to a new country; acculturation can take years. The same is true for a new executive. It will take time to fully understand the organization's nuances, and having a trusted colleague to turn to can help. HR and talent management professionals can facilitate ongoing acculturation by:

- Assigning a coach who can offer the personal and professional support new leaders will need as they learn about their new organizations.
- Being a partner themselves in the development and success of the new executive.
- Making “orientation” a lifetime process through the availability of additional learning.
- Being actively involved in the individual's development plan.

Major Areas of Focus	"Current Job"	"New Job"	How you think, look, act and behave differently	Questions you have about your new job
Priorities				
Leadership Team				
Key External Stakeholders				
Key Internal Stakeholders				

## FedEx's Executive Success Orientation



Through FedEx's Leadership Principles Program, the company works with both formal and informal leaders at all levels to foster career paths. They have created a learning organization through the development of a curriculum composed of formal, accelerated, experiential, online (e-learning) and other blended learning programs, starting with non-management employees and reaching up through senior and executive officers:

- Center for Employee Self Development for employees to view career paths and gain the knowledge and skills needed to pursue their chosen path.
- College Consortium composed of accredited learning institutions that provide incentives to employees--such as credit for experience and courses taken at FedEx Express.
- Leadership Principles 1 for managers, a nine to 12-month program providing them the basics they need (operational/business skills and how to lead people) to make the large step into management.
- Leadership Principles 2 for senior managers which help them understand themselves and the basics of leading managers.
- Leadership Principles 3 for directors which help them make the transition from a tactical thought process to one more strategic in nature.
- EXCEL for vice presidents, integrating the complexities of operating in a global environment and providing support in recognizing the need for corporate and personal responsibilities within our community.
- Executive coaching for senior level officers.

## FedEx (...continued)

All these are supported with (a) recurrent intervention training that is provided at all levels depending on particular needs and (b) a formal ten-month Coaching for Performance program that uses webinars, peer coaching and conference calls to foster and recognize implementation of desired behaviors. All these offerings are tied into a comprehensive talent management and succession planning process.

## Step 6: Encourage Ongoing Communication

By following these last five steps, HR and the organization has made sure the new executive's network is in place to ensure success. The new executive has been informed, met with key stakeholders, been coached and is ready to go. HR should now let them know that during their first 90 days on the new job, they should work quickly to align their teams, identify or reaffirm key goals and objectives, and set direction. And, the HR team should assure them that they will be with them every step of the way on this journey.

One important action HR can encourage and be involved with are regular employee meetings and feedback sessions to foster communication, read the pulse of the organization, learn about what is going well and what is not, and gather thoughts for moving forward. If this is done, the new executives are ready to begin making significant contributions quickly—and the entire organization will be there to support them.

## About UNC Executive Development

Our approach to program design and delivery draws upon the power of real-world, applicable experiences from our faculty and staff, integrated with the knowledge our client partners share about the challenges they face.

We combine traditional with experiential and unique learning to ensure that all individuals gain relevant new skills that they can easily implement within their own organizations. Through action learning and business simulation activities, we challenge participants to think, reflect and make decisions differently.

### Our Approach: The Partnership

Our team customizes each leadership program through a highly collaborative process that involves our clients, program directors, faculty and program managers. We are dedicated to following-up with our clients and individual participants to ensure that their learning experiences have been meaningful and impactful. This integrated approach consistently drives strong outcomes.

### Our Approach: The Results

Our executive education programs are designed with results in mind, and we are focused on successfully meeting our clients' business and academic expectations. Below are a few examples of the results our client partners have achieved:

- Big data analytics
- Leadership refocused with new strategy and cohesive vision
- Strategic plans created for the global marketplace
- Supply chains streamlined
- Products redefined
- New markets targeted
- Cost-saving measures developed
- Silos leveled
- Teams aligned

Participants leave empowered to bring in new ideas, present different ways to grow business and tackle challenges. The result is stronger individuals leading stronger teams and organizations.

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